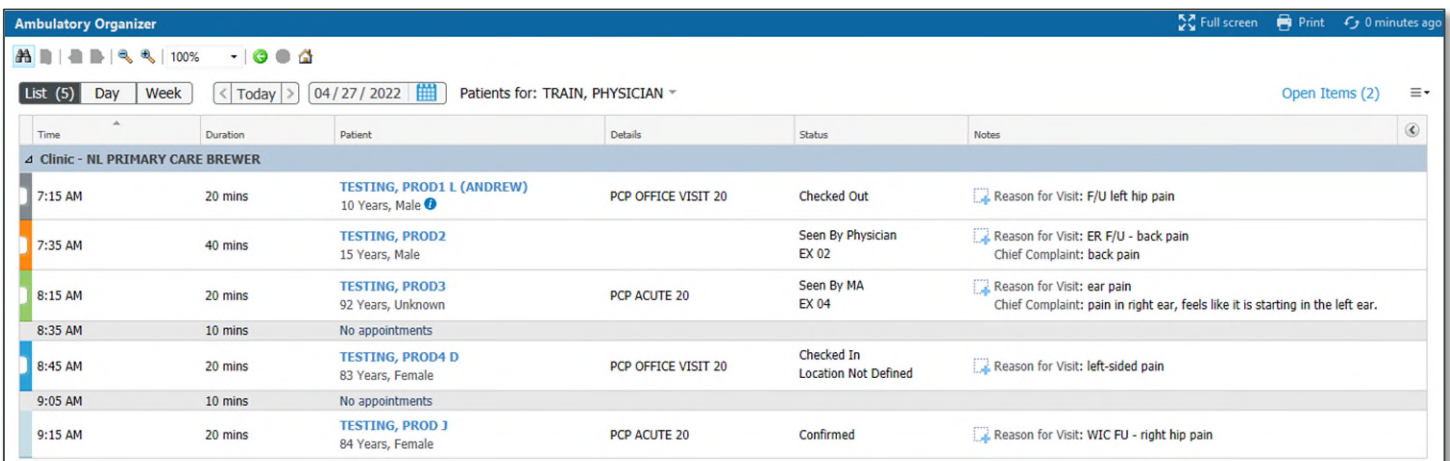


The Ambulatory Organizer provides a simple, comprehensive view for Ambulatory staff to efficiently access and manage their patient schedule, documentation, and charges.

## Ambulatory Organizer Overview

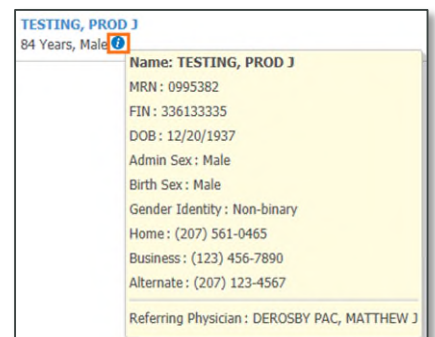
The Ambulatory Organizer provides a snapshot of scheduled appointments, as well as any appointment gaps, appointment times and details, patient information and status, and outstanding tasks for each scheduled visit.



Time	Duration	Patient	Details	Status	Notes
<b>Clinic - NL PRIMARY CARE BREWER</b>					
7:15 AM	20 mins	TESTING, PROD1 L (ANDREW) 10 Years, Male	PCP OFFICE VISIT 20	Checked Out	Reason for Visit: F/U left hip pain
7:35 AM	40 mins	TESTING, PROD2 15 Years, Male		Seen By Physician EX 02	Reason for Visit: ER F/U - back pain Chief Complaint: back pain
8:15 AM	20 mins	TESTING, PROD3 92 Years, Unknown	PCP ACUTE 20	Seen By MA EX 04	Reason for Visit: ear pain Chief Complaint: pain in right ear, feels like it is starting in the left ear.
8:35 AM	10 mins	No appointments			
8:45 AM	20 mins	TESTING, PROD4 D 83 Years, Female	PCP OFFICE VISIT 20	Checked In Location Not Defined	Reason for Visit: left-sided pain
9:05 AM	10 mins	No appointments			
9:15 AM	20 mins	TESTING, PROD J 84 Years, Female	PCP ACUTE 20	Confirmed	Reason for Visit: WIC FU - right hip pain







### ➤ List View

- This is the default view and is a snapshot of a single day's appointments for the resource book(s) selected. Once a resource is selected, additional information displays:
  - Time:** Displays the time of the scheduled appointment. If more than one resource book is selected, the provider scheduled to see the patient will display under the time indicated.
  - Duration:** Displays the length of the appointment that was scheduled for the patient.
  - Patient:** Displays the patient's name, including their preferred name, age and gender, and gender identity. Single-click the patient's name to open the record for the FIN associated.
    - An italic *i* will display when a patient identifies as a different gender than their birth sex.
    - Hovering will provide more information such as MRN, FIN, DOB, Contact numbers, Admin Sex, Birth Sex, Gender Identity, and the referring provider.
  - Details:** Displays the appointment type the patient is scheduled for.



TESTING, PROD J	
84 Years, Male	
Name: TESTING, PROD J	
MRN : 0995382	
FIN : 336133335	
DOB : 12/20/1937	
Admin Sex : Male	
Birth Sex : Male	
Gender Identity : Non-binary	
Home : (207) 561-0465	
Business : (123) 456-7890	
Alternate : (207) 123-4567	
Referring Physician : DEROSBY PAC, MATTHEW J	


- **Status:** Displays the status of where the patient is in their visit using different colors for different statuses (see below chart); hovering on a cell in this column will provide additional details in regards to if the note has not been started or if it has been completed, if the charges have been placed or not, and if the patient has outside records available.

	Light blue indicates a confirmed appointment.
	Medium blue indicates a checked in appointment.
	Green indicates seen by nurse, medical assistant, medical student, or custom status has taken place.
	Orange indicates a Seen by physician, advance practice partner, resident, or custom status has taken place.
	Dark gray indicates the appointment has been checked out.
	White indicates a No Show, Hold, or Canceled appointment.

- **Notes:** Displays the reason for the visit and populates the chief complaint once documented.
- **Timeline:** Displays the selected resource in a view that mimics the **Day** view. Timeline can be collapsed and expanded by selecting the arrow within **List** view.

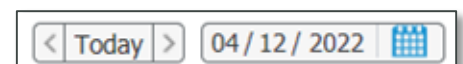


#### ➤ Day and Week View

- The Day and Week views provide other ways to view the scheduled patients for the selected resource(s) and timeframe. These views are recommended when viewing multiple resources at once.
  - When viewing multiple provider schedules on the **Day** view, each provider will display side by side, the provider is indicated under the time of the appointment.
  - When viewing multiple provider schedules on the **Week** view, each provider's schedule is displayed on their own tab.

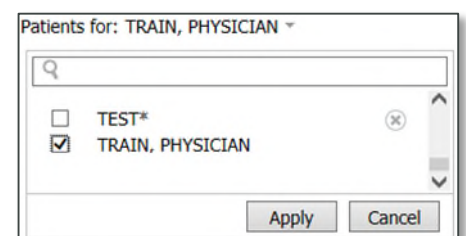
#### ➤ Date

- This defaults to the current date. Select an arrow or the calendar icon to change the date.



#### ➤ Patients for:

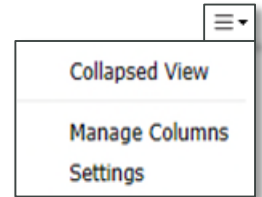
- This drop-down allows for selection of a resource. Multiple resources can be selected to view at one time.
  - Select the down arrow to search and select the desired resource(s). A checkmark indicates the schedule(s) selected for viewing.



- To remove a resource from the drop-down list, hover over the resource and click the X that appears to the right of the resource.

### ➤ Settings

- This allows users to customize their Ambulatory Organizer by updating **Settings**, **Managing Columns**, or selecting a **Collapsed View**.



## Open Items

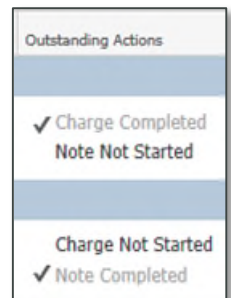
Open Items displays unfinished task for a patient's visit for the resource(s) selected. If more than one resource is selected, each open items list will display on a separate tab. Open Item tasks will display the appointments in sections of Today, Yesterday, 2 days ago and More than 2 Days Ago.

The screenshot shows the 'Ambulatory Organizer' interface. At the top, there are tabs for 'List', 'Day', and 'Week', with 'List' selected. Below the tabs, it says 'Patients for: TRAIN, PHYSICIAN'. A date range 'From: April 6, 2022' is shown with a 'View 7 More Days' link. The main table has columns: 'Appointment', 'Patient', 'Details', 'Notes', and 'Outstanding Actions'. The table is divided into sections: 'More Than 2 Days Ago (1)' and 'Today (1)'. The 'More Than 2 Days Ago' section shows an appointment for April 12, 2022, at 7:15 AM for 'TESTING, PROD1 L (ANDREW)', a 10-year-old male, with details 'PCP ACUTE 20' and notes 'Reason for Visit: ED Discharge Follow-up'. The 'Outstanding Actions' column shows 'Charge Completed' with a checkmark and 'Note Not Started'. The 'Today' section shows an appointment for April 27, 2022, at 7:35 AM for 'TESTING, PROD2', a 15-year-old male, with details 'PCP OFFICE VISIT 40' and notes 'Reason for Visit: ER F/U - back pain' and 'Chief Complaint: back pain'. The 'Outstanding Actions' column shows 'Charge Not Started' and 'Note Completed' with a checkmark.

Appointment	Patient	Details	Notes	Outstanding Actions
<b>More Than 2 Days Ago (1)</b>				
April 12, 2022 7:15 AM	TESTING, PROD1 L (ANDREW) 10 Years, Male	PCP ACUTE 20	Reason for Visit: ED Discharge Follow-up	✓ Charge Completed Note Not Started
<b>Today (1)</b>				
April 27, 2022 7:35 AM	TESTING, PROD2 15 Years, Male	PCP OFFICE VISIT 40	Reason for Visit: ER F/U - back pain Chief Complaint: back pain	Charge Not Started ✓ Note Completed

### ➤ Outstanding Actions Column

- Displays what task(s) is unfinished for the patient's appointment.
- The column will display **Charge Not Started** or **Charge Completed** for the charge for the visit and **Note Not Started**, **Note Saved** or **Note Completed** for the documentation for the visit. Once all tasks are complete, the appointment will no longer display in the Open Items view.



**NOTE:** Sometimes a minor charge will mark the FIN as *Charge Completed* when the full Office Visit has not been charged out.